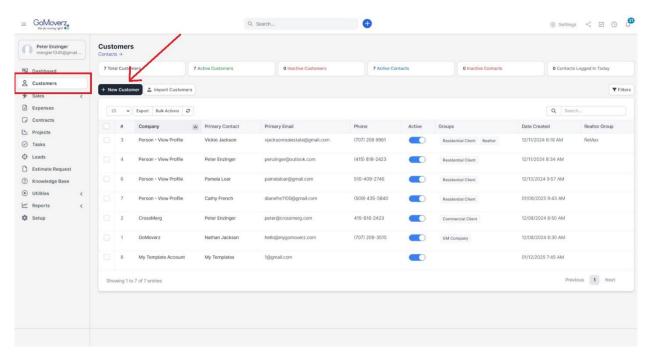
To create a new 'Customer" account in your CRM

Step 1. Click on Main Menu item "CUSTOMERS"

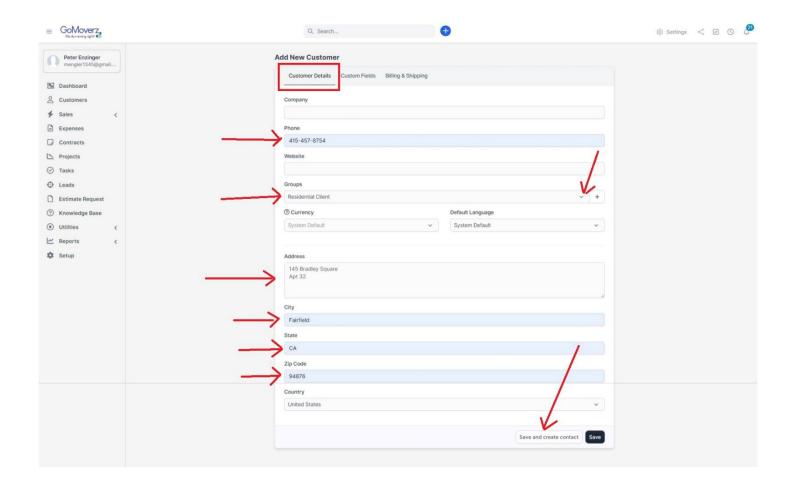
Step 2. Click on "NEW CUSTOMER"



Step 3. In the tab "CUSTOMER DETAILS" enter the following items only, not any of the others yet.

- a. Phone (enter phone in this way 415-457-8754)
- b. Under the "Groups" click the dropdown and choose "Residential Client"
- c. Address (if this is an apartment, the enter the main address first, add a coma, then the apt #) Example: 145 Bradley Square, Apt 32
- d. City
- e. State (CA) * always use the CAPITAL LETTERS IN ABRIVIATED FORM
- f. Zip code

When this information is entered, click SAVE AND CREATE CONTACT.

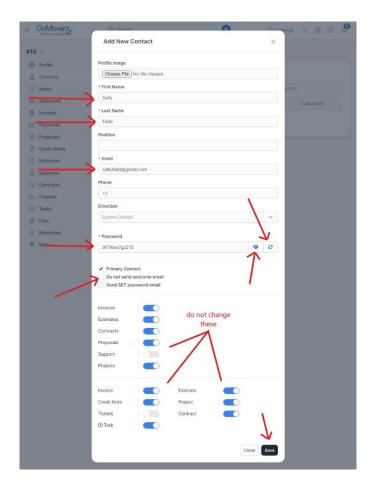


A Popup Dialog box opens, fill-in all fields that have RED ARROWS. *Please note, that you can optionally check the box "Do not send welcome email" yet. We should get your email templates completely developed BEFORE you put these on autopilot.

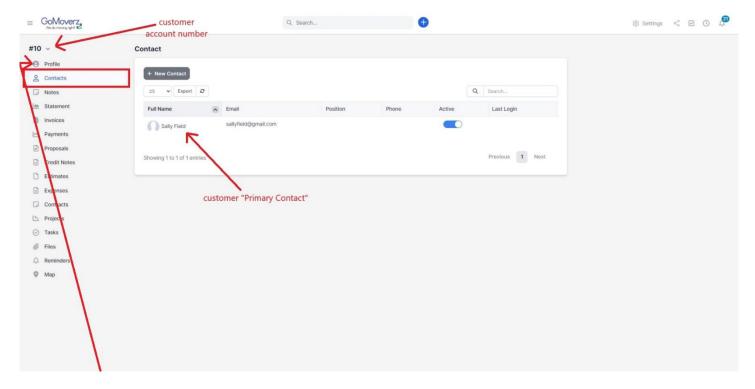
Also, you can manually set a "Password" or have the system automatically assign these. To do this, I suggest you do, click on the "2 half circle arrows" which will generate the password, then click the "eye" which will show the password so you can keep a copy of it if you want. Also, now or at anytime in the future you can choose the "Send SET password email" to the customer that will send them a "Password Reset" email.

Everything below these sections are configured accordingly, so don't touch them. If you think you need to call me and we can look through this together so nothing is done by mistake that WILL affect other parts of the System Automation.

Then just click "Save



A new Dialog box will open. This show the "Contacts" tab of the "sub menu" with the "Primary Contact" for the customer account showing. You can add as many "Contacts" as you want in the customer account, but these MUST always be a "Primary Contact"

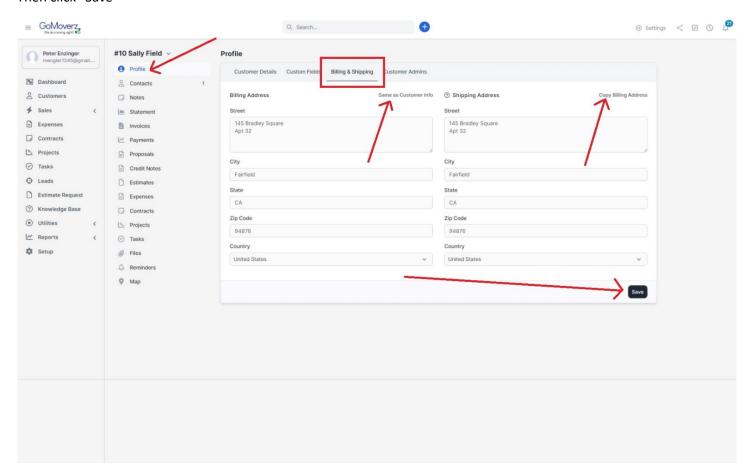


Step 4. Click on the "Profile" tab directly under the "Customer Account Number" which will show the Customers main account screen.

Now click on the Billing & Shipping" tab under the Profile.

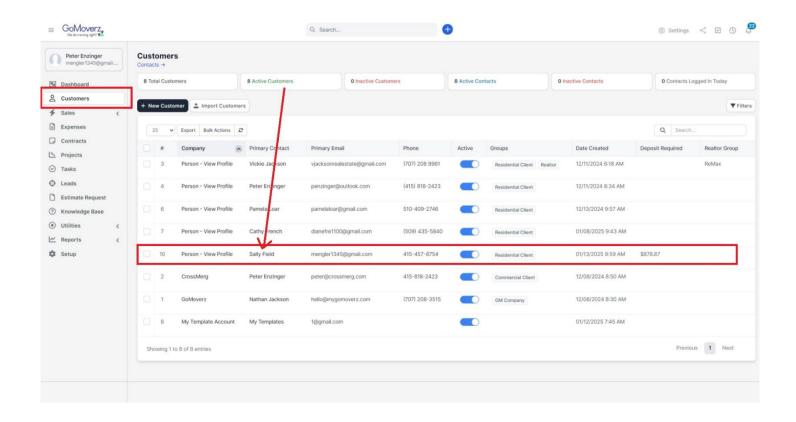
Here, you can click on the words "Same as Customer Info" and "Copy Billing Address" which automatically pulls in the information you enter when creating the New Customer account in Steps 1-3 above.

Then click "Save"



Step 5. Click on Main Menu item "CUSTOMERS"

This will reveal all your customers. You'll see the new customer you created, in this case it's Sally Field



THAT'S IT, YOU'RE DONE CREATING A NEW CUSTOMER